



Customer Experience Beyond Memos

A How-To Guide

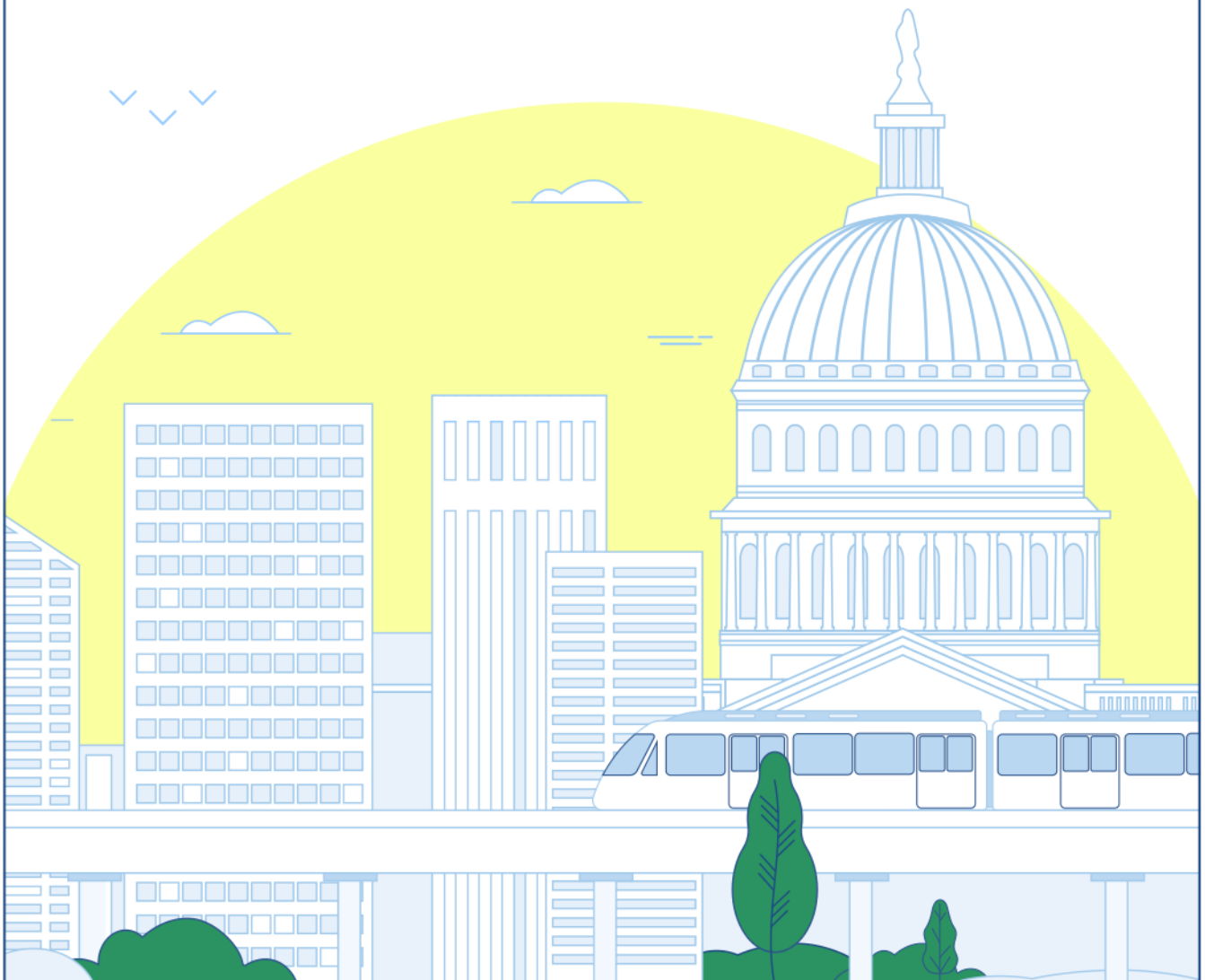


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Executive Summary

Turning 65, having a child, navigating a foreclosure, burying a loved one, applying for financial assistance. Our lives are a compilation of these and other personal, sometimes complex, experiences that require government support or involvement.

“But too often, people have to navigate a tangled web of Government websites, offices, and phone numbers to access the services they depend on” — a reality that the [White House](#) recently amplified when President Biden issued a [customer experience \(CX\) executive order \(EO\)](#) in mid-December 2021.

For the federal, state and local public servants responsible for delivering on this promise, you all are both service providers and taxpayers. Your expertise, concerns, and work and life experiences are vital to designing a government that works for us all.

Equitable, accessible, effective, trustworthy and human-centered — these are your guiding themes. These words shape how the government reimagines and reconstructs the way it serves the public and supports employees working to bring this vision to life.

It’s with these truths in mind that we developed this guide. Consider it your journey map that answers these questions:

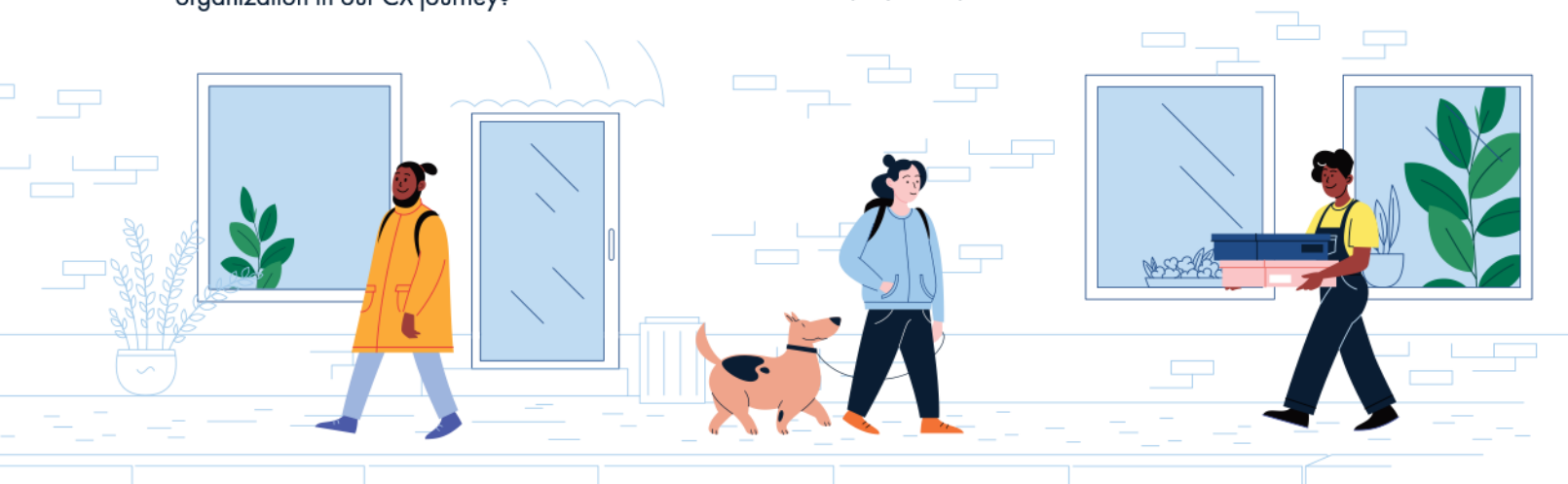
- CX isn’t new in government, so why is it a big deal now?
- How can I influence CX in my current role by putting people at the center of my work?
- How are forward-thinking government agencies overcoming barriers and approaching CX in impactful ways?
- What tools, metrics and mindsets can help me and my organization in our CX journey?



How to Use This Guide

The purpose of this guide is to elevate our understanding of and approach to CX in government. We do that by amplifying the collective wisdom of the GovLoop community through interviews, case studies, mini worksheets and graphics. They each provide tangible ways to take a customer-centric approach to everyday work — regardless of title or agency. We also feature insights from industry thought leaders who are playing a key role in supporting government CX efforts. Those sections are labeled “Industry Perspective.”

We focus primarily on experiences with the public, but this guide can and should be used to shape the experience of customers or stakeholders within your organization or in other agencies. Use this guide both as a personal resource and as a conversation starter within your agency to evangelize and advocate for improved customer and employee experiences.



CX Snapshot

What Does Customer Experience Mean?

Before we dive in, let's first define customer experience. The EO, which we will [delve into later in the guide](#), defines it this way:

"The public's perceptions of and overall satisfaction with interactions with an agency, product, or service."

That builds on previous definitions, such as this one:

"The sum of all experiences a customer has with your organization." — Digital.gov

What's at Stake?

There's a clear acknowledgement that experiences alone aren't enough. The global pandemic further exposed the fragility and inequities woven into the public's encounters with their governments. If people cannot meet their objectives, lack confidence in the delivery and reliability of government services, or perceive that their needs aren't considered or met with the necessary urgency, then the very foundation of true CX is faulty.

At play is what Harvard Law Professor and Author Cass Sunstein calls **sludge** — the administrative burdens, such as filling out complicated online forms, mailing in paperwork, and standing in line at the motor vehicle registry, that have reverberating impacts. Sludge exacerbates inequalities, impairs health and can rip the promise of opportunities away from people. That includes a job, a permit, an educational opportunity or necessary medical help, Sunstein writes in his book *"Sludge: What Stops Us from Getting Things Done and What to Do about It."* Internal administrative burdens also affect government employees.

Takeaway: *Sludge, or administrative burdens, create a time tax, preventing people from getting what they need in a timely manner — or at all.*

What Does the Data Show?

The data is telling. Although the federal government's overall customer satisfaction score is improving, it still has the lowest rating across industries, according to the [American Customer Satisfaction Index](#).

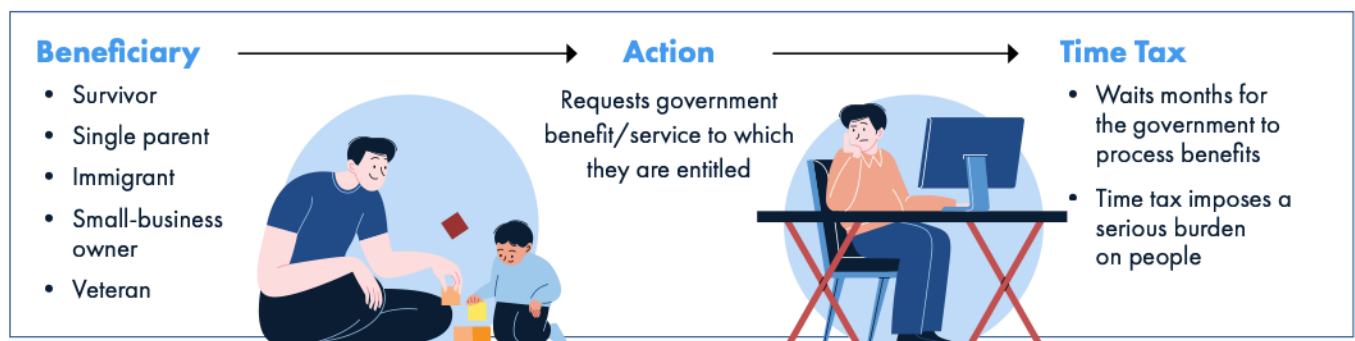
While researching, writing and interviewing government and industry experts for this guide, it became clear that CX is just as much an end goal and a vehicle for the government to build trust with the public as it is an employee mindset and a discipline.



Think of CX as a car, with many parts under the hood that make it work: governance, measurement, perceived value, a human-centered mindset, technology, service design, process, equity, reliability, trust, accessibility, inclusion, urgency, accountability, funding, procurement, data, communication and empathy.



The EO echoes Sunstein's insights, which we've visualized:



Building on these components, let’s briefly discuss key points to keep in mind as you consider what CX means for you and your organization now and into the future.

- **Trust is the currency that fuels experiences,** whether you’re the employee serving or the constituent receiving. If we don’t have confidence in the systems, leadership and intentions of government, people suffer. Consumer and software products suffer and so do services. Every interaction with the public must be built on trust. “A customer’s experience interacting with the Federal government directly contributes to their trust in government itself,” the Office of Management and Budget (OMB) said in its updated CX guidance for federal agencies. This is equally true for state, local and tribal governments.
- **Centering others improves how you show up for them.** There will be people you serve who have lived experiences you’ve never faced and needs you can’t relate to. But can you pause long enough to listen with intention and compassion? Can you respond with urgency, care and equity?
- **You matter.** In fact, you are vital to ensuring that public interactions with your agency demonstrate competence and build trust. Whether or not you directly interface with the public, you have a part to play. The way you conduct your work, the empathy that you exude and the environment you create for others have a trickle-down impact on the public.

Your CX Cheat Sheet

Employee Experience: Employee experience is the way in which employees internalize and interpret the interactions they have with their organization, and the context of those interactions.

CX: The public’s perceptions of and overall satisfaction with interactions with an agency, product or service.

Customer life experience: Each important point in a person’s life at which that person interacts with one or more government entities.

Equity: The consistent and systematic fair, just and impartial treatment of all individuals, including those in underserved communities that have been denied such treatment.

Human-centered design: An interdisciplinary methodology of putting people, including those who will use or be impacted by what one creates, at the center of any process to solve challenging problems. This applies to government communications, products, interactions and systems.

Below is a snapshot of drivers that impact CX. Notice how the column on the right affects the pillars of CX, which are people, process and service quality.

Customer Experience Drivers	Driver Sub-Categories
Service Quality	Service Effectiveness / Perception of Value
	My need was addressed. / My issue was resolved. / I found what I needed. / My question was answered.
Process	Ease / Simplicity
	It was easy to complete what I needed to do. / It was easy to find what I needed.
	Efficiency / Speed
	It took a reasonable amount of time to do what I needed to do. / I found what I needed on the site quickly.
	Equity / Transparency
	I was treated fairly. / I understand what was being asked of me throughout the process.
People (If applicable for a transaction)	Employee Interaction / Warmth / Helpfulness / Competence
	Employees I interacted with were helpful. / The call center representative was committed to solving my problem.

Source: OMB

Focus Areas

The remainder of this guide will delve into five key areas that impact overall CX in government, including technology, policy, a customer-centric mindset, hiring, and professionalizing CX and metrics.

→ Infuse Technology and Human-Centered Design

Simple, seamless and secure. That's the vision for government websites, portals, online forms and fickle systems — many of which were designed in response to policies and bureaucratic regulations, not to meet people's diverse needs.



The challenge: "We sometimes forget, when wading through hundreds of pages of legalese and standards, that the core of those documents is aimed at improving the lives of the public in some way," writes Jenn Noinaj, a former GovLoop featured contributor and social impact strategist, researcher and designer who is passionate about using design to solve society's most pressing challenges.



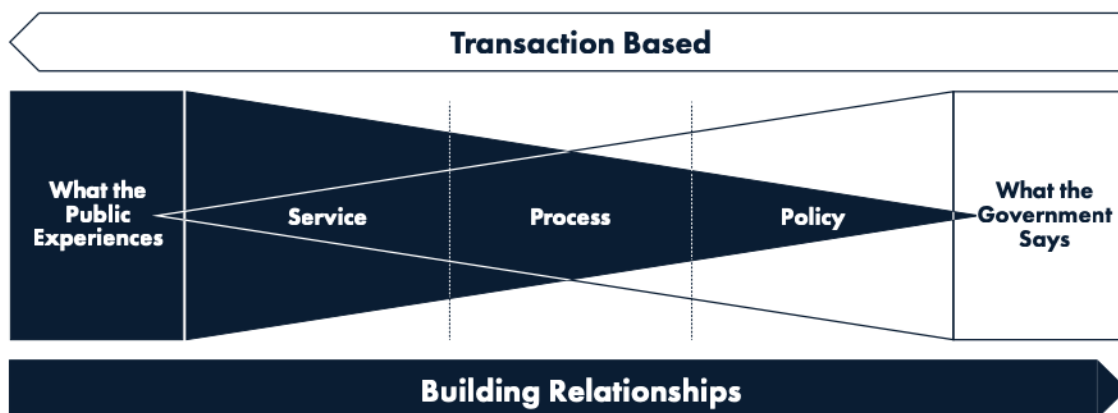
Reframing the challenge: "Embracing human-centered design methods can help us ensure that we can see the forest beyond the trees, and find solutions that work for the people," Noinaj said.

In this portion of the guide, we're talking about design in terms of technology design and the importance of centering end users when creating products and services. (Noinaj provides more details about the four interrelated aspects of design [here](#).)

Human-centered design isn't just for designers. The Partnership for Public Service cites human-centered design as one of eight core technical competencies of a 21st-century workforce.

Because everyone is in different stages of this evolution, with varying technological capabilities, we've highlighted some insights that you can either put into practice now or tuck away for future use.

This chart shows the dynamics between what the government says it's doing and what people actually experience. It also illustrates truths that the nonprofit Partnership for Public Service has expressed: Trust in government and experiences with government are about a long-term relationship, not a transaction.



Created by Jenn Noinaj, adapted from the graphic in Designing for Public Services

* This article continues on [page 8](#)

How to Design for Customers in the Open



An interview with Sebastian Dunne, Principal Solution Architect, Public Sector, Red Hat

Improving constituents' everyday experiences is just as much an inside job as it is an outward-facing one. Organizational culture, how failure is defined and employees' ability to collaborate in the open are factors of success.

"It's also important to recognize that customer experience isn't just an IT problem," said Sebastian Dunne, Principal Solution Architect at enterprise software company Red Hat. "It has to be much more than dumping it on the IT team to 'fix the website.' There have to be more creative approaches, and you have to involve the right people."

Dunne knows the power of collaboration and openness because it's in Red Hat's DNA. This mindset shapes how his colleagues interact with government partners such as North Carolina. The state needed an agile system with strong security capabilities to help facilitate its return-to-work strategy.

Within four weeks, the state had an operational system. It provides 60,000-plus employees with a self-service approach for sharing vaccination status or a negative COVID-19 test before returning to work. Human resources (HR) teams can regularly track the data, send reminder emails and generate reports, among other tasks. The solution included the Red Hat OpenShift container and Kubernetes platform, which allowed business owners and developers to work swiftly to develop the new application without worrying about the underlying infrastructure.

Dunne shared how agencies can foster richer experiences internally and for the public.

1. Design with others and in the open

"The basis of everything we do is that the more people involved in an open source project, the better the results are going to be," Dunne said of Red Hat's open source development model. "The more eyeballs on it, the more ideas you're generating."

2. Don't punish failure

"Fail fast doesn't mean fail catastrophically," Dunne said. "Think of it as a license to experiment."

Agencies can progress further and faster when they accept that they can't and won't know all the requirements or have all the answers as they're building applications, he said. But they need a license to test, iterate and adjust based on usage data, customer feedback and other metrics. The bottom line: Learn from the customers.

3. Require security by design

One of the painful lessons from the pandemic is that there is an unacceptable cost to failure, Dunne said. Providing access to secure and reliable systems that the public depends on is among the areas where government can't fail.

Although agencies can and should glean from the best that commercial software companies have to offer, security must be a central driver of great CX, not an afterthought. Red Hat OpenShift allows agencies to create software development pipelines "out of the box" and include automated security testing as part of every build of the application.

"There needs to be ways of measuring success and understanding what customers expect and what a successful service looks like," Dunne said.



Give all employees a baseline of human-centered design

- Train employees on the disciplines that drive modern service delivery: [human-centered design](#), product management and [Agile](#).
- Provide hands-on learning opportunities to develop the muscle for centering problem-solving around people.
- Consider users' emotional needs when designing digital services and other touchpoints across government.
- Learn to speak the language used by civic tech companies and government entities such as the [General Services Administration's 18F](#) and the [U.S. Digital Service \(USDS\)](#).



"Getting people comfortable thinking in those ways...aligns us with how the new workforce coming in have been taught to think in school. It also gives longtime employees a fun new way to reframe their experience in how they do work."

— Chaeny Emanavin, Director, Office of Innovation, California Health and Human Services Center for Data Insights and Innovation

Center people and outcomes during the IT procurement phase

- Partner with your procurement teams to ensure that elements such as usability and accessibility are baked into requests for proposals.
- Budget for usability and accessibility and ensure that your investments account for people's limitations with bandwidth, devices, access and comprehension of what you're trying to communicate.
- Ensure that your city, state or agency's expectations and standards for CX are clear internally and externally. (For example, Georgia makes clear that it may conduct a third-party neutral audit to test what vendors are building.)
- Cultivate a product culture that designates and empowers government employees to prioritize work for the development team.
- Embrace user experience tests early and often. Staying within the boundaries of government requirements, incentivize constituents to participate.



"The change of focus from just being obsessed with an output to now being aware of what the outcome needs to be is really where I believe most governments need to be going."

The more aware organizations are going there, where they are more concerned with the outcome of something rather than just an output."

— Nikhil Deshpande, Georgia's Chief Digital Officer

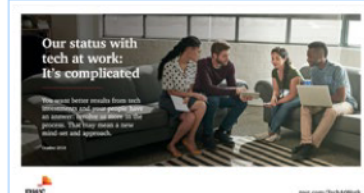
Procurement is core to how government evolves from CX concepts to delivering better experiences through technology or other platforms. Sasha Magee, Former Technical Director at the San Francisco Digital Service, reupped a [tweet](#) illustrating the evolving awareness of government procurement and its importance.

Elevate internal user experiences as part of the design process

- Perform a formal or informal sludge audit to document the extent to which cumbersome systems impede work and the impacts. Make findings transparent and available to leaders empowered to address these burdens.
- Foster knowledge-sharing among system owners, operators and staff who interact with those systems.
- Help users better define requirements for what they need and understand what tech is available to them. (The Health and Human Services Department Office of Inspector General hosts technology discovery days to facilitate learning, for example).

"When you don't have a clear and accurate understanding of how your people use technology in their jobs, and what they need and want from those tools, their overall experience at work can suffer."

— PwC's "Our status with tech at work: [It's complicated](#)"



Good CX Begins With Good Network Operations



An interview with Tom Van Meter, Senior Director of Systems Engineering for Federal, Juniper Networks

Providing your users with good digital services is like getting a glass of water. When the user turns on the faucet to fill a glass, they should expect the glass to fill without worrying about the plumbing.

Digital services rely on the underlying network the way the water faucet relies on the plumbing to deliver water. Underlying network performance is vital to provide customers with a good experience, said Tom Van Meter, Senior Director of Systems Engineering for Federal at Juniper Networks, which provides networking and cybersecurity solutions.

For example, imagine someone wants to download a tax document from the IRS website. “If the website isn’t working, or if it takes a long time to download, the customer’s going to be upset before they’ve even had a chance to look at that document,” he said.

Van Meter highlighted three advances in network technology that can help agencies improve the customer experience.

Session-Based Routing

When delivering services to users working outside the main network, a session-based router makes it possible to determine the optimal path through the network at a given time and for a given application. It’s like having a smart navigation app for the network infrastructure. It’s invisible to the end user, but it increases the likelihood of delivering a satisfying experience.

Multi-Vendor Data Center Management

Agencies often struggle to manage network performance because they use equipment from multiple vendors. The complexity of their network operations makes it difficult to automate at scale. A multi-vendor data center management platform, such as Juniper’s Apstra, reduces that complexity by starting with an open architecture, making it possible to automate the design, deployment and management of operations across the environment. The system takes an

outcome-based approach to managing operations, using predictive analytics to determine how to achieve intent-based performance targets.

AI-Driven Operations

Access points, switches, firewalls and other network devices generate a lot of data that can be used to gain insight into user experiences. The problem is that there’s more data than traditional automation tools can handle. That’s where artificial intelligence (AI) and machine learning (ML) come into the picture. With AI and ML, it’s possible to manage network performance proactively across all network domains, including wired, wireless and cloud environments. Juniper also uses its Mist AI engine, called Marvis, to power a virtual network assistant that IT staff can use to optimize the operational network.

The Network Matters

Juniper provides an array of advanced networking capabilities that help agencies deliver high-quality services and solve customer problems — which helps make the network an afterthought for those customers, just like the house’s plumbing is an afterthought when getting a glass of water.

But the network should never be an afterthought for agencies. **“You want technology that enables you to have a stable, consistent and functional network,”** Van Meter said. **“Don’t settle for just barely good enough.”**



A Case Study in the Value of a CX Perspective



An interview with Kevin Brooks, Principal Digital Strategist (DoD/IC), ServiceNow

Here's an example of how looking at a problem through a lens of customer experience (CX) can help agencies arrive at a solution:

Several years ago, there was an issue with black mold in the Army's on-base housing at Fort Sill, Oklahoma. The problem festered until the local media did a story, which caught a local congressional representative's attention and led to a congressional hearing.

Through this experience, the Army realized that it needed to make it easier to ensure that such problems are identified and resolved effectively and transparently. In short, this was not just a mold issue. It was a CX issue.

From that perspective, the problem was not that Army employees did not want to provide good customer service. It was that they did not have the tools needed to do so.

"Everyone I've ever met in government, including when I worked inside government, wants to provide great experience to their customers," said Kevin Brooks, a Principal Digital Strategist at ServiceNow who focuses on the Defense Department and the intelligence community. "It's disheartening when you can't deliver."

Removing Blockers

In this case, the solution was the Army Maintenance Application (ArMA), an app that soldiers and their families use to report problems and track those reports through resolution. They no longer need to go to or call the public works office. They can even attach photos with their request.

Together, the Army Materiel Command and ServiceNow developed the idea for the app – the minimum viable product, or MVP, in Agile terms – in just one day, and deployed it in just three months. In the first six months after ArMA was deployed, customer satisfaction ratings increased by 35%, Brooks said.

The app is now available across the Army.

Aligning IT, CX

One key was that the app did not require any changes to underlying systems. Instead, it simply connects to systems that were previously siloed.

Sometimes, an agency's CX and IT functions can seem to be at odds, with the CX team looking for new capabilities while the IT team is just trying to manage and modernize legacy systems, Brooks said. As the ArMA example shows, customer service and modernization are not conflicting goals.

"It's about getting both sides to understand that you can advance the CX conversation while you modernize," he said.

Aligning CX, Culture

ServiceNow helps agencies build a roadmap that aligns their CX and IT initiatives. But that's just part of the story.

ArMA happened because Army leaders made it a priority. They recognized that the service needed to take a customer-oriented perspective. Getting that cultural shift throughout an entire organization is huge, and it begins with getting buy-in from senior leaders, Brooks said. "If that hasn't happened, the technology really isn't going to matter."

servicenow

→ Align With Federal CX Policies, Guidance, Executive Order

Released on Dec. 13, 2021, the Biden administration's "Executive Order on Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government" holds government accountable for designing and delivering services based on how people actually experience them — not on what government thinks of them.

It describes every interaction between the federal government and the public as an opportunity to save a person's time and provide the kind of service that the public expects, deserves and is entitled to.

- The plan **commits to improving 36 types of customer experiences across 17 federal agencies** and to promoting agency coordination whenever possible — for instance, between the departments of Treasury and HHS when determining who's eligible for health insurance subsidies.
- It relies on **enhanced use of technology, empirical evidence, behavioral science** and other mechanisms to craft CX and service delivery that better serve the public.
- And the EO **instructs agencies to root out the causes of their CX challenges**, while ensuring that all reforms maintain privacy, civil rights and other protections.

Department secretaries and leaders of entities called High Impact Service Providers (HISPs), which include the Federal Emergency Management Agency, IRS, Food and Drug Administration, and 32 other agencies, will submit to OMB a prioritized list of the customer experiences they need to improve. OMB will help decide which projects to approve, based partially on how many people would benefit and the availability of federal dollars.

"Customer experience" means the public's perception of and overall satisfaction with interactions with an agency, product or service.

"Our Government must recommit to being 'of the people, by the people, [and] for the people,'" the EO says. "When a disaster survivor, single parent, immigrant, small business owner, or veteran waits months for the Government to process benefits to which they are entitled, this lost time is a significant cost not only for that individual, but in the aggregate, for our Nation as a whole."

More information about the EO is available online.

President's Management Agenda

Lays out a broad, three-part vision for Biden administration policy that addresses: the **federal workforce and diversity, equity, inclusion and accessibility, or DEIA (Priority 1)**, **customer experiences (Priority 2)**, and the **economy/business of government (Priority 3)** — Published November 2021

Executive Order

Directs federal agencies to make customer experiences more human-centric and expands on the PMA — Published December 2021

OMB Circular A-11 (Part 6, Sect. 280)

Reinstates and expands on guidance eliminated in late December 2020 that tells federal agencies how to develop, track and deliver on CX goals — Published March 2021

Executive Order

President's Management Agenda - PRIORITY 2

Strategy 1

Improve the service design, digital products, and customer-experience management of federal HISPs by **reducing customer burden, addressing inequities, and streamlining** processes

Strategy 2

Design, build, and manage Government service delivery for **key life experiences** that cut across Federal agencies

Strategy 3

Identify and prioritize the development of Federal **shared products, services and standards** that enable simple, seamless and secure customer experiences across HISPs

Requires CX reforms that, among other things:

- **End some paperwork & mailing** requirements
- Create new and expanded **online services and tools**
- Modernize **websites**
- Simplify and coordinate **enrollments and applications**
- Centralize online systems
- **Promote technology** for customer support (e.g., online chat)
- **Eliminate in-person interviews** and signatures
- Encourage **telehealth** services
- Call for online, **mobile-friendly ways** to upload documents

Mandates that agencies:

- Identify and resolve **root causes of CX problems**
- Base reforms on **empirical research**, behavioral science, user testing and similar items

Calls on agencies to protect **privacy, civil and other rights**

Improves **36 specific customer experiences** across 17 agencies

Restructures www.USA.gov around key life events (not agency names)

Requires OMB to:

- Prioritize a certain number of customer experiences for **governmentwide improvement**
- Resolve issues of **overlapping agency responsibilities**
- Coordinate with other entities on its guidance to federal agencies, looking for ways to make data sharing and data support more efficient — including with **state, local and tribal governments**

Reworks Login.gov to seamlessly integrate with the Veterans Affairs Department

OMB Circular A-11

- Helps agencies **implement the government's CX framework** and expands on previous versions of Circular A-11
- Targets CX initiatives **based on type of federal service** involved (administrative, benefits, compliance, etc.), rather than by specific agency
- Details how executive agencies must ID, describe, evaluate, **improve and track all services** they offer — with similar requirements for HISPs

Creates processes for OMB to:

- Designate HISPs
- **Annually assess** their CX abilities
- Develop CX improvement plans
- Facilitate **interagency projects**

3 Counter-Intuitive Rules for Improving CX



An interview with Chris Radich, Vice President, Digital Strategy, Global Public Sector, Salesforce

More than ever, the public sector recognizes that customer experience (CX) is key to mission success.

Look at the executive order on transforming federal CX. Initiatives like these demonstrate that agencies nationwide want to improve their customer interactions.

How can governments at every level make their operations more customer-centric? One option is cloud-based customer relationship management (CRM). Through cloud-based CRM platforms, agencies can boost constituent satisfaction and trust.

“Everywhere we look, there are policies driving improved customer experience,” said Chris Radich, Vice President, Digital Strategy, Global Public Sector at Salesforce, which provides cloud-based customer engagement tools such as API [application programming interface] management.

Radich described three ways that agencies can modernize their CRM platforms using cloud computing.

1. Adopt a beginner’s mindset

Without a doubt, legacy technology can be an obstacle to better CX. But legacy thinking can be an obstacle as well.

If agencies are still thinking in terms of traditional IT, they might not recognize the opportunities they have to bring real change. “The biggest risk I’ve seen is a legacy way of thinking,” Radich said.

The solution is a beginner’s mindset — learning what is possible with cloud and considering how it can benefit your customers and employees. With multiple SaaS technologies supporting CX functions, agencies no longer need to rely on custom code to meet mandates like the CX EO.

Take New York City’s Department of Information Technology and Telecommunications (DoITT). After the COVID-19 pandemic began in 2020, DoITT launched a cloud-based platform for scheduling, administering and tracking vaccinations for New York City’s constituents. Read the full case study [here](#).

2. Rethink the “rip and replace” approach

With modernization, agencies often assume they must overhaul all their technology. While modernizing tools can always provide value, agencies need not do so all at once.

“Sometimes we’re challenged to make improvements because we think it is dependent on modernizing the entire legacy customer service infrastructure,” Radich said.

He cited a federal agency with call center traffic that skyrocketed from several thousand to tens of thousands of customer calls daily due to COVID-19. Rather than replace its entire legacy CRM platform, this agency integrated modern loan intake, processing and case management tools instead with an API-led approach. Deploying these cloud-based tools took the agency only 72 hours.

3. Embrace self-service

Sometimes, the best experiences customers can have is when they don’t interact with people at all. Using cloud-based CRM platforms, agencies can give customers the independence they crave. For instance, cloud-based CRM platforms can enable agencies to offer online self-service options to constituents.

Cloud-based CRM platforms like those Salesforce provides can assist agencies with delivering satisfying products and services to their customers digitally. Ultimately, cloud-based CRM platforms can close the gap constituents may encounter between public- and private-sector CX.

“It is time that customer service becomes an enterprise capability at every agency,” Radich said.



Foster a Customer-Centric Mindset and Values

Some employees seem to exude empathy. They have a knack for embodying sentiments and feedback from the people they interact with, and they respond accordingly and with care. But other employees may struggle in this area or appear indifferent.

Although training helps articulate organizational expectations and workforce competencies around fostering a customer-centric mindset, there's more at play.

Organizations can't expect from employees what they are not willing to invest in employees — and that starts with improving how employees experience their work.



Stephanie Thum, CCXP #CustomerExperience #CX
@stephaniethum

Red tape. 🤨 It ambushes leaders' best intentions with employee experience. Yet, so many leaders refuse to acknowledge the impact of red tape on job satisfaction, attrition, and stress.

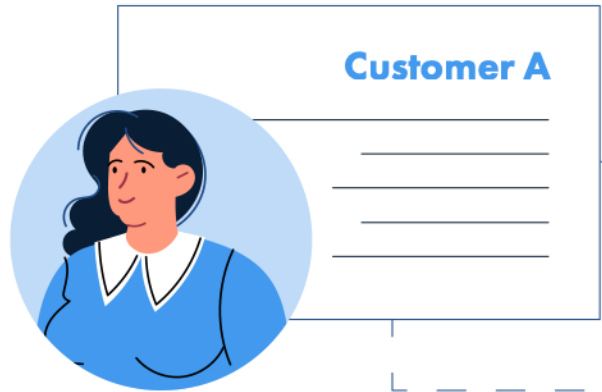
Why would employees *want* to improve #CX if their own experience is hard?

When employees are valued, freed up, equipped and empowered to do good work, they can think more clearly and be people-centric when shaping experiences for others.

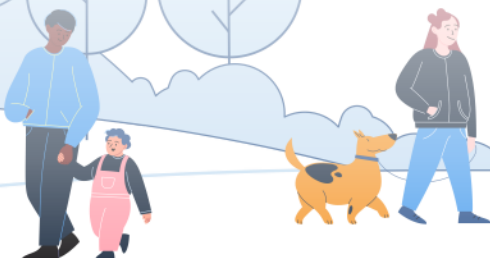
Understanding who customers are, what they're trying to achieve and the emotions — past and present — they bring to any interaction with you is vital. Here's a short exercise from GSA's blog that you can use with customers and adapt for colleagues, direct reports and various stakeholders.

You can create a mini customer journey by asking two main questions:

1. **Where is this person coming from?** *What did they do/have they tried before coming to me, whom did they call, what websites did they visit, what do they know, how do they feel?*



2. **Where will this person go next?** *What are they trying to do, where can they find answers, how can we make this easier, how can we leave them in a good place, how can we make them feel better?*



Embrace the power of personality tests



Knowing what drives, frustrates and triggers you as a provider of government services is key, said Kelly Brown, a GovLoop featured contributor and CX veteran in local government. Brown wrote D.C.'s first set of customer service standards.

"One of the things I think is particularly helpful are the personality tests," such as Enneagram, she said.

- You can gain an introspective look at how you think and operate.
- You can better understand what fuels you and what personality types you might mesh or clash with.
- You can better understand your strengths, weaknesses and areas to improve.

"You pull back the layers and understand why you react the way that you do, and what is the best environment for you to thrive in," Brown said. "You can position yourself to always provide the best customer service because you already know what your triggers are."

Customer service can't be an act or you won't be able to maintain it for long, she said. Here's a mini checklist you can use to check in with yourself.

- Be observant and aware of what's happening around you.
- Be introspective and aware of how those events impact the way you feel.
- Be honest about what you feel is going well and not going well.

Learn more: These types of personal exercises are foundational for understanding what drives employees to go beyond what's required and provide what's needed. On GovLoop.com, Brown shares how a 911 dispatcher used social media and unconventional methods to stop an attempted suicide.

Exposure to customers' frustrations speaks louder than memos

Federal Chief Information Officer Clare Martorana recalled an experience she had during her third week working at the Office of Personnel Management. On the other end of her phone line was the voice of someone she would never forget: a widow whose husband had been a 40-year federal employee. The woman couldn't get through to a government call center, but kept dialing numbers to get a human on the line. Martorana wasn't equipped to answer her questions.

"But I could listen," she said.

"Every time I ran into roadblocks about our call center or things we didn't have funding for, or challenges, I kept going back to that woman and that voice in my head of, 'She could be my mom, she could be my aunt, she could be my friend and my neighbor, and there are hundreds of her out there,'" Martorana said during the 2021 Federal Customer Experience Summit. "And I really took it seriously that I wanted to be the person that didn't just hang up the phone and go on to my calendar and see what next meetings I had. I really wanted to take it to heart and share it with my employees because they felt equally as passionate as I did about it."

Her takeaway: Martorana shared that conducting user research and hearing customers' raw emotions motivated her more than any strategic plan or high-level meeting. She encourages others to use ongoing conversations about what is not acceptable and collaboration — from the C-suite to the developers — to bust bureaucracy and create solutions.



Making Equitable Digital Experiences a Reality



An interview with Bill Donellan, Vice President, Public Sector, Adobe

The president's customer experience executive order makes clear that putting the citizen first must be more than an ideal. Creating personalized and equitable experiences for a diverse public requires continuous and concrete actions, including understanding who is and isn't being served; meeting people where they are; and closing the gaps using a human-centered approach, the right tools and metrics.

"When we have concrete targets, we can hold agencies accountable for progress," said Bill Donellan, Vice President of Public Sector at Adobe, a software company. This is especially true for the government's high impact service providers (HISPs) or those agencies called to raise CX standards because of the scale and impact of their public-facing services.

"HISPs have a long history of grading their own homework," Donellan said.

That's led Adobe to partner with agencies such as VA and the Census Bureau to benchmark themselves against comparable commercial entities. Central to those efforts are unifying data and reporting across customer touchpoints and digital journeys.

"The pandemic accelerated the government's need to provide digital services and increase accessibility, usability and responsiveness," Donellan said. **"It's imperative for agencies to reach people regardless of where they live, their technological capabilities or financial resources."**

Understand pain points

The key for Adobe's agency partners is understanding what pain points customers face and developing solutions that address them.

"We ask questions like, how are citizens engaging with your agency and services? Is it in person or online? What is the specific pain they are feeling? What is the key barrier for them to take action? How can you make that process easier for them and your employees?" Donellan said.

Elevate accessibility

Knowing that strategic investments in technology will alleviate accessibility issues can motivate agencies to take on new projects and help set minds at ease, he said.

For example, the EO states that the State Department will design and deliver a new online passport renewal experience that does not require mailing physical documents.

And leading up to the nation's first online census in 2020, Adobe worked with the Census Bureau to create personalized content and landing pages in 59 languages to help all Americans take part. According to the Government Accountability Office, 99.98% of all housing units were accounted for with an estimated \$1.4 billion in savings.

"To reach the masses effectively, agencies must consider features such as mobile-friendly digital forms, legally secure signatures, website compatibility on any device while complying with accessibility standards as mandated by law," Donellan said, citing Adobe's partnerships with Oklahoma and Los Angeles County Department of Public Social Services as examples.

"It's about putting yourself in the citizen's shoes, anticipating their needs," he said. "Organizations can analyze and research best-in-class customer experiences in the private sector to help better understand expectations and what it takes to successfully provide equitable and accessible digital services."



Don't Let Complexity Trip Up the Customer Experience

An interview with Kale Fluharty, Director of Federal, Liferay, Inc., and Frank Lacson, Human Centered Design Lead, Imagine Believe Realize (IBR)



Kale
Fluharty



Frank
Lacson

One of the most important steps toward providing a good customer experience is to keep complexity from getting in the way.

As agencies undertake CX initiatives, they are likely to find themselves having to work around the limitations and architecture of legacy systems. The challenge is to make the experience as seamless as possible for the user.

"In a modern, self-service culture, it's no longer acceptable to pass the customer around from legacy system to legacy system or require them to call an operator who collects or disseminates information over the phone," said Kale Fluharty, Director of Federal at Liferay.

Liferay provides a digital experience platform designed to make it easier to facilitate seamless experience, whether the intended customers are constituents or employees. It has more than 15 years of experience providing agencies with personalized, self-service solutions.

Getting Personal

In one case, Liferay and its partner, Imagine Believe Realize (IBR), worked with the Navy to replace a group of portals with a modern, consolidated solution that could be personalized according to both user preferences and paygrade.

The Navy wanted to provide one-stop access to online human resources, education and training information that helps sailors navigate their career paths. But those resources were scattered across several underlying systems and databases. And with the Navy looking to make the system available to 870,000 potential users, it would be infeasible and expensive for a patchwork, stovepiped system to meet the Navy's performance requirements.

Liferay's digital experience platform provided a modern, futureproofed way to bridge those systems and simplify access to information and services. The platform also made it possible to personalize access and services without compromising on security or diminishing performance.

Standardizing Good CX

One benefit of the current push for better CX is that agencies are trying to deliver more consistent customer service across their organizations, said Frank Lacson, Human Centered Design Lead at IBR.

In the past, the quality of CX tended to vary across divisions or, in the case of the Navy, across commands. Like other agencies, the Navy is looking to standardize on best practices and share lessons learned. That makes for a much less jarring experience as service members move from one command to another.

"Delivering a consistent customer experience helps users transition gracefully between their personal and professional lives," Lacson said.

Continuously Improving

But standardization does not mean stagnation. Agencies should look for a platform that provides an agency a continuous data-driven feedback loop. That includes:

- Capturing data about the customer journey
- Automating the analysis of that data to provide insights into what's working and what's not
- Making it easy to modify the experience based on those insights

This agile approach to CX "helps agencies quickly have an impact on how they are doing business and raise their CX scores," Fluharty said.



Now Hiring: Professionalizing CX in Government

The trailblazer efforts to champion CX in government are beginning to bear fruit.

In 2021 the federal government achieved its highest CX score yet, gaining an average 1.5 points from 2020 according to Forrester's U.S. Federal CX Index 2021 report. This wouldn't be possible without the public servants dedicated to the cause.

But yet: Finding qualified professionals continues to be one of the greatest challenges.

- Several HISPs, or agencies providing public services with significant scope and scale, reported that the lack of staff with CX expertise is a barrier to effective implementation, particularly in the fields of design and product development.
- On top of that, government hiring processes don't often have the best reputation for being convenient and efficient.

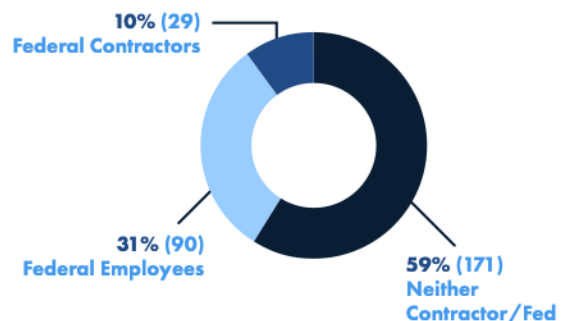
That's why improvements in the hiring process and clarity of roles can help agencies fill their CX talent gaps through recruitment.



Hiring Improvements and Impact

In 2020, OPM and USDS conducted a pilot project for hiring CX talent governmentwide. Twenty CX experts across nine federal agencies collaborated to create a shared job announcement. Applicants could apply once and be considered for multiple roles. The participating agencies used subject-matter experts to assess candidates' qualifications rather than relying on self-assessments. "The goal was to qualify and effectively assess all applicants so that we could try to place every single qualified applicant somewhere in the government," according to a recap of the process on Performance.gov.

CX Employment Background Applied N=290



It was so successful they received rounds of applause from hiring managers and HR staff, the team told GovLoop in 2020. Since then, similar CX hiring efforts have taken off.

* This article continues on page 20

How Government Is Delivering CX at the Largest Scale Yet

An interview with Angy Peterson, Vice President, Granicus Experience Group, and Charlotte Lee, Strategic Lead for Customer Experience and Innovation, Granicus



Angy Peterson



Charlotte Lee

Agencies are experiencing brand-new challenges with customer-centric service delivery.

Although commercial organizations have been experimenting with and delivering customer experience (CX) for years, government is now bringing about a novel approach to CX – namely when it comes to scale.

“This is not just what the private sector has done by any means,” said Angy Peterson, Vice President for Granicus Experience Group (GXG), a digital firm that helps government build better citizen experiences. “This is truly trying to serve and create access to services for hundreds of millions of people, the 300 million or so living in this country.”

Because of this, the imperative to serve all, not just some, is vital.

“It’s important to know the role that a deep consideration for diversity, equity, inclusion and accessibility will mean toward the mission to improve the experience of people receiving government services,” said Charlotte Lee, Strategic Lead for CX and Innovation at Granicus. “Many companies, even large, well-known ones, have chosen not to invest in basic accessibility features. Government doesn’t have the option not to serve certain people.”

How can agencies continue an inclusive journey to deliver multichannel, human-centered services at a scale unlike any organization before?

Communication Tools as Constituent-Understanding Tools

To tackle such a large-scale challenge, start with what’s in front of you. Agencies can use their existing communication channels to better understand constituents.

“Look at the tools you have available that you may not be seeing as data tools,” Peterson said. “All these digital communications solutions are in some way capturing data and thinking about the customer experience in a more holistic way.”

For instance, many federal agencies use Granicus’ GovDelivery platform as a tool for outreach and general communications. GXG has seen agencies expand their customer understanding, knowledge and empathy when they take advantage of the data they’re already capturing through the platform to understand constituents’ preferences, pain points and experiences.

Granicus has worked with one large federal public health agency for more than nine years, helping them first achieve broad messaging with a few thousand subscribers to now targeted messaging with millions.

The agency captures and leverages sophisticated, segmented data that lead to rich customer insights, such as knowing where constituents are in different enrollment and benefits processes. It also can analyze this data and insert it into a feedback loop that can continuously improve processes and services.

“There’s a difference in the roles between innovation and invention in government transformation like this. With such a massive vision laid forth, there are boundless opportunities to empower teams with human-centric leadership,” Lee said. **“And from our Granicus perspective, we’re feeling the most excitement when talking to our federal clients who are relieved to see there’s more data to work with than they thought. Agile iteration can bring the quick wins to make headway for true transformation over time.”**





We caught up with an applicant, Alexis Schilf, who now works as a Customer Experience Strategist at the Consumer Financial Protection Bureau.

“As someone who came from outside government, government resumes and application systems can be incredibly opaque and intimidating. This process was much more streamlined compared to previous efforts,” Schilf told GovLoop. She was considered for roles on 13 teams after applying once through USAJOBS.gov. The process included a few rounds of interviews to be deemed qualified, and then she interviewed with specific agencies for fit.

She has a built-in network of fellow problem-solvers thanks to OMB’s continued efforts to connect the 20 employees from her CX hiring cohort monthly.

Schilf shared this advice for anyone considering a CX role in government:

“More and more support and momentum is being given to invest in how we serve the public. For those looking for CX roles, I suggest getting connected with your local civic tech group or reach out to those [doing] the work. I’ve found there are opportunities to do this work at the federal, state and local levels under many different names, so think about the scale of work you want to be doing and apply! We need more talented CX folks across government.”

What’s Required of Candidates

You may be wondering: What does a CX role entail? Take a look at a sampling of CX professionals in government, and you’ll find an array of backgrounds, disciplines and experiences. But there are some core responsibilities and qualifications you should know.

Sample qualifications

- Using adaptive **leadership** and **resiliency**
- Developing CX **strategy**
- **Managing** CX implementation
- Applying **human-centered design**

Sample responsibilities

- Build understanding within services or programs of who customers are, their needs, the value the public seeks from government services and the moments that matter most.
- Gather and package customer feedback, research and data to develop insights for supporting leaders’ decision-making.
- Create and support a culture for improving CX and achieving measurable outcomes.
- Drive opportunities and projects through completion while maintaining respect for colleagues and tactfully building coalitions of support.
- Collaborate with colleagues to embed human-centered design practices.



How to Keep Employees and Constituents Happy



An interview with Matt Hale, Senior Solutions Consultant, Zendesk, Inc.

Public-sector customer experience (CX) is complex and gets to the heart of how employees and constituents interact with and perceive agencies' products and services.

Yet pleasing both groups grows harder every time government workforce, budget and other constraints change. How can agencies fit their talent and constituents under the same umbrella while satisfying everyone's needs?

Agencies are increasingly supplementing their limited in-house resources with the on-demand benefits that cloud computing provides. Using the cloud's on-demand capabilities like data analytics, agencies can assist any internal and external users alike.

"Government is starting to see that improving CX is a win for everybody," said Matt Hale, Senior Solutions Consultant at Zendesk, Inc., a cloud-based customer service solutions provider. "Digitized processes can improve the experience for constituents and staff."

Hale explained three ways that the cloud can help agencies deliver a pleasant CX to all their users.

1. Draw inspiration from data

Knowledge is power, and the data that the cloud can collect, analyze and store can drive positive momentum across agencies' internal and external CX efforts.

"The data is the best place to start," Hale said. "The good thing about today's robust service platforms is that they are generating a wealth of insights."

Take tasks such as applying for driver's licenses that often have long wait times. Leveraging cloud-based data analytics, agencies can find and improve such potential pitfalls.

"Look for spots where customers or constituents might become frustrated or overwhelmed by service delivery," Hale said.

2. Offer omnichannel communication

Most people communicate via several digital channels. Constituents and government employees are no exception, so agencies should embrace as many communication mediums as possible.

"CX rests on building a strategy that is going to be rooted in modern means of communication with constituents," Hale said. "It is the channels that they are already using in their private lives."

Consider the Illinois Court Help program, which informs the public about the state's judicial system. Recently, the program launched a cloud-based help center. This website gives the initiative's roughly 2 million customers a digital-first option for easily accessing court forms, processes and information. For the program's employees, the result is significant savings in energy, funding and time.

3. Embrace elasticity

The cloud's decentralized IT model lets agencies add new tools to their infrastructure more quickly and easily. Ideally, the goal is fueling agencywide agility with cloud-based abilities.

"I like to think of the software we use in this space as a toolkit to make the constituent experience better," Hale said.

Agencies adopting the cloud should consider its Software-as-a-Service (SaaS) model, which delivers software on a subscription basis. SaaS clouds like those Zendesk, Inc. provides can enable diverse CX innovations—like applications for communicating with the public—for agencies.

"This software is constantly evolving and constantly being updated," Hale said. "There is always something that can be done."



→ Incorporate CX Metrics and Feedback

There are a lot of things you can measure and many ways to measure them when it comes to customer experiences. There's sentiment data, performance metrics and equitable outcomes, which we're increasingly seeing agencies move toward measuring.

For this section, we've rounded up nuggets of wisdom from professionals in different disciplines who are centering CX and embracing metrics to drive impactful change.

Develop competencies around data gathering and usage

Nikhil Deshpande, Georgia's Chief Digital Officer, who was also [featured earlier in the guide](#), explained his thought process for fostering competencies around data-driven customer experiences for digital services.



Goal: Collaborate with state agencies to develop a maturity model that measures the effectiveness of their digital presence.

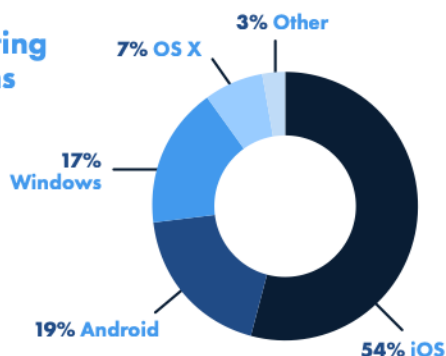
- What does success look like for their digital properties, such as websites, for example?
- What parameters will show whether they are meeting that goal?
- What supporting data must be collected to validate success?
- What is the best way to collect that data?
- What's the right amount of data to collect?
- Is the data understood, and can actions be taken based on that data?

From analytics.georgia.gov: Each state website earns a performance grade — called its Georgia Analytics Program (GAP) score — based on how well it does in three key areas: Quality Assurance, Accessibility and Search Engine Optimization. Georgia wants all of its websites to score 80 or higher.

Site Name	Quality Assurance	Accessibility	SEO	GAP Score
Judicial Nominating Commission	98.8	91.8	92.6	94.4, A
Georgia Aviation Authority	96.5	95.4	89.0	93.7, A
Department of Driver Services	99.1	88.5	93.1	93.6, A

Here are a few data points from the Department of Driver Services:

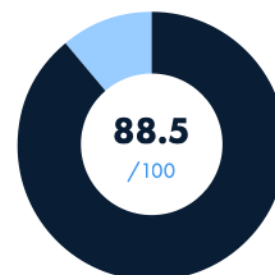
Operating Systems



* January 2022 snapshot

Accessibility

The Accessibility score measures how well a website adheres to the federal government's Web Content Accessibility Guidelines. Learn more about WCAG.



* This article continues on [page 24](#)

Getting the Info Your Agency Needs in Moments that Matter



An interview with Suzzanna Martinez, Senior Marketing Manager, Public Sector, Elastic

No one wants to hunt for the right answer when the clock is ticking. Yet too often, government employees and their customers do just that.

Now, many agencies are realizing that their constituents and workers cannot find actionable insights quickly and easily. When tackling challenges such as severe weather, delays in discovering crucial information can affect everyone involved.

The stage is set for modernizing agencies' search capabilities. By adopting cloud-based search tools, agencies can get useful data rapidly and effortlessly. Even better, this knowledge can keep agencies' constituents and talent on the same page.

"It is about understanding the moments that matter and where government is needed most," said Suzzanna Martinez, Senior Marketing Manager, Public Sector at Elastic, a cloud-based enterprise search solutions provider.

Martinez shared three ways that cloud-based enterprise search tools can improve agencies' internal and external customer experience (CX).

1. Prime search tools for success

Before launching search tools, agencies must understand how their employees and constituents will use them.

The idea is to tailor tools so that they meet all users' needs, and everyone can get the facts they want without wading through irrelevant content.

"Citizens can find the information that they need, get back to their lives and be prosperous," Martinez said of quality search tools. "But we don't want to lose sight of the personnel. They need information at their fingertips too."

Before adopting new search tools, agencies should consider consumer journeys. Consumer journeys map the steps people take to obtain or deliver products and services. Using consumer journeys, agencies can improve search tools for their customers and workforces.

2. Embrace data analytics

Once agencies have search tools, their leaders and employees can use them to continuously enhance the decisions.

"That's a trend we're seeing – reviewing analytics to continually improve website performance and ultimately customer experience," Martinez said. "Every click can tell you what people are looking for on your website."

Wilson, North Carolina recently leveraged data analytics while preparing for a hurricane. Before the storm hit, city officials analyzed searches on Wilson's website. Most users sought information about flood prevention and roadway hazards, so Wilson's government was able to plan for the optimal resources required based on customers' search behavior.

3. Make data accessible everywhere

Today, more agencies have hybrid workforces combining on site and remote employees than before. To operate effectively, these agencies need search tools that can unearth advantages wherever data resides and enable role-based data sharing.

Cloud computing can facilitate this outcome by letting agencies collect, analyze and share data across any distance. Cloud-based search tools like those Elastic provides can give agencies enlightening, timely and secure data whenever it is needed most.

"It is making agencies' jobs that much easier to do," Martinez said. "The data should be on the same sheet of music where it is normalized."



Create performance goals that stick

The president's EO asks agencies to make improving CX an integral part of their strategic and performance plans, both at the organizational and individual levels. Stephanie Thum, a Certified CX Professional and former Vice President of CX at Export-Import Bank, shared performance measurement basics from the Performance Improvement Council's [PIC.gov](https://pic.gov) resource.



Stephanie Thum, CCXP #CustomerExperience #CX
@stephaniethum

...

A super one-page, plain language primer on performance measurements. What are they? How do you develop them? How do you link them to your business goals? What mistakes should you avoid? Applies to #CX! #CustomerExperience #Metrics #Measurements
pic.gov/content/quick-...

Here are some common mistakes to avoid:



Too many measures: Organizations that measure everything may end up understanding nothing because insights get diluted in the noise.



Misalignment with strategic priorities: Organizations that cannot link performance gauges to the final destination are far less likely to arrive at their destination on time, intact and on budget.



Nothing under the hood: Many organizations write down measures without an underlying data collection, calculation and reporting methodology. These are vital if the measures are going to be real.



Unrealistic measures: Sometimes the most well-intended measures are simply outside the reality of data collection. This is common with outcome measures, which sound great in theory but are much harder to capture in practice.

Know your budget numbers

Money is a metric. It carries new weight as agencies manage the massive infusion of stimulus money, which includes projects for improving constituent services and experiences. Wayne County, Michigan, for example, received \$340 million from the COVID-19 relief bill, which is 60% to 65% of its entire general fund.



Tracking how money is spent, ensuring that proper controls are in place, knowing where money is in the payment pipeline and making that process transparent to internal customers is where Hugh Newsome, the county's Chief Financial Officer, is prioritizing much of his energy.

"It's important for us to be able to articulate why we have certain controls in place and why we have to comply with certain things, as well as provide procurement support, budgetary relief support, budgetary control support, whatever it is, in a timely manner," Newsome said.

For initiatives funded by the American Rescue Plan, different parts of the organization must sign off on various metrics such as eligibility and equity, he said. But where do you start?

A Treasury Department webinar that focused on driving equity with state and local fiscal recovery funds included these prompts to consider:

- Think about the highest-impact service you provide.
- How do you know if those services are reaching the intended beneficiaries and those most in need?
- Who else could you talk to/engage to learn more than you know now?



During the [Treasury Department webinar](#), Leila Al-Hamoodah, Operations Advisor in the Colorado Governor's Office, shared a template for tracking stimulus-funded initiatives. Notice the focus on outcomes and CX.

Metric Type	Proposed Metrics to Track	Can you collect:	
		Geographic Detail? (Y/N)	Demographic Detail? (Y/N)
Performance			
Output(s)			
Output(s)			
Required metric(s) (per Treasury guidance)			
Operational (optional at this stage)			
Throughout/Process			
Customer Experience			
Other			
Other/Misc.			

Throughout the guide, we've mentioned high-impact services and service providers. Metrics are vital to measuring not only who they are serving, but how equitably they do it. During the Partnership for Public Service's 2021 CX forum, leaders from three federal HISPs shared insights.



David Gooder, Commissioner for Trademarks, Patent and Trademark Office

"I came from a background where we didn't change a thing on our brands unless we understood what consumers thought about it. And that kind of focus on the consumers now is more part of the conversation every day."



**Jose Bonilla, Executive Director
Traveler Engagement,
Transportation Security
Administration**

"We touch just about everybody: passengers with disabilities, medical conditions, all races, ethnicities and genders. And so we had to evolve and adapt to that. So as we build requirements for technology, we have to bring these individuals in to help us build those requirements. That's how we have formulated moving towards a touchless experience."



**Jean Moody-Williams, Deputy
Director, Center for Clinical
Standards and Quality, Centers for
Medicare and Medicaid Services**

"Our administrator also just recently released the CMS Strategic Plan. Within that there were pillars. The first one was equity. And she often says it's the first question we ask, not the last. Reaching our customers at all levels is extremely important."

How to Take a Human-Centered Approach to CX



An interview with Stephen Ellis, Government Solutions Lead, Zoom Video Communications

Across government, there is a renewed emphasis on the customer experience (CX) regarding engagement with the public. In an era of easy-to-use apps to order products and services and obtain support, it is imperative to adapt these experiences for government-related uses.

Whether providing digital services or seeking input on policies, improving CX is about making those engagements more effective and accessible, said Stephen Ellis, Government Solutions Lead at Zoom Video Communications.

This emphasis isn't just for IT early adopters. It truly transcends generations and socioeconomic differences. Let's say an agency is holding a traditional in-person public meeting about a proposed highway. Although some people would attend in person, many others might not because they can't drive or take public transportation, can't get off work, or have no one to take care of their kids. Their voices — their ability to take part in civic dialogue — will be lost, to the detriment of the government's goal for the meeting.

"If you only have one way for people to come in and express an opinion, you are going to limit the impact of that hearing," Ellis said. "Using the broadest spectrum of tools to reach the broadest spectrum of people — on the platforms the public prefers to use — is very important."

Missing Information

Consider an online form. It might capture information effectively, but it misses the human dimension, the emotional content that facial expressions and body language convey. Such nonverbal information can help agency staff work with constituents more effectively.

Think about someone having trouble applying for assistance after a disaster, Ellis said.

"This isn't just a form to them, it's their life," he said. "When we're able to capture that nonverbal information, to show to that person they are important, when government employees are able to convey more of their humanity and empathy for a difficult situation — we can transform people's lives."

A Human-Centered Approach

To drive these types of outcomes, agencies need to take a human-centered approach to modernizing their CX processes, Ellis said.

When introducing new technology, agencies need to consider how people will interact with that technology, how their lives can be at the center of that process. "The technology is going to work best if the human experience drives the process," said Ellis.

"IT leaders across government are bringing their personal experience as a consumer into their CX modernization initiatives, and this is very powerful," he said. "To really embrace the art of what's possible, you need to ask how the customer experience would feel if you were on the other end."

Zoom for Government has been authorized to operate at the Federal Risk and Authorization Management Program (FedRAMP) Moderate level. Zoom for Government has also received Authorization to Operate with Conditions (ATO-C) for Department of Defense Impact Level 4 (IL4) from our service sponsor: the Department of the Air Force.



Don't Settle for Good Enough: How to Create Impactful Customer Experiences



An interview with Bill Wright, Senior Director, North American Government Affairs, Splunk

What data source guides more than a trillion dollars in federal funding every year? None other than the census, of course.

In 2020, the Census Bureau carried out what can be considered the nation's largest civilian undertaking: an accurate count of everyone in the United States. The agency serves a range of clientele so massive – from individuals to whole governments, public servants to local communities – that it wasn't easy to roll out its first digital count.

In this immense effort, the Bureau faced key challenges. How could it unify dozens of disparate data sources to gain insights that were easy to access, while also ensuring the security of the data?

By using the right technology and having the right technology mindset, the agency was able to reduce manual door-to-door efforts and bring data to every decision-maker across departments. The public, in turn, completed the census online for the first time.

The Right Technology and Mindset

A key factor to the Bureau's success was investing in modern technology to deliver excellent services.

"One of the primary barriers that has to be overcome is the notion that citizen experience is 'good enough' for government," said Bill Wright, Senior Director of North American Government Affairs at Splunk, a data platform provider.

In today's digital age, technology powers so much of constituent experiences. Agencies can't afford to wait on modernizing. They must invest in modern IT so that customer experience (CX) efforts don't languish but continuously improve.

"It's not that the government hasn't been investing in IT. It's that these investments are often misplaced," Wright said. As much as 80% of IT- and cybersecurity-focused funds nurse outdated and often unsecure legacy solutions. Agencies should instead re-route investments into modern cloud-based technology that can deliver updated infrastructure, applications and other technologies that are both less expensive and more secure.

Data platforms are one of these technologies. With Splunk at the center of the Census Bureau's security operations center (SOC) and network operations center (NOC), the agency successfully navigated the first digital census while proactively identifying vulnerabilities and advancing its cloud transformation.

Additionally, data platforms with artificial intelligence can mine feedback online, by phone or email to analyze whether a constituent received satisfactory service with an agency. This kind of intelligence can easily be folded into customer service platforms in an automated fashion. Splunk, for example, partners with agencies to deliver data-driven, real-time insights and improve service delivery over time.

But more than anything, to go from "good enough" to "excellent," the central tenet to any successful CX initiative is the customer – understanding who they are and what their journey looks like.

"More often than not, those interactions are done virtually and rely heavily on technology," Wright said. "So agencies should look at how innovative technology and data can complement their efforts to bring the great citizen experience that we all want."



→ Conclusion

The ongoing journey of acknowledging, elevating and driving equitable customer experiences is a layered one. The chasm between current and future operations varies widely among cities, states and even federal agencies.

Closing that gap will take a multipronged approach. It requires senior leaders and employees to frame and reframe problems and opportunities differently. As a government employee, you are essential to this work.

If you found this resource helpful, let us know at info@govloop.com. Share it with a colleague, reach out to a public servant featured in this guide and continue to apply what you've learned.

About GovLoop

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Additional Resources

There are passionate people in and outside of government working to elevate CX. Click the tweet to see names and profiles of fellow enthusiasts and potential collaborators to connect with on your CX efforts.



Nicole Blake Johnson
[@nicoledblake](https://twitter.com/nicoledblake)

Government CX practitioners/supporters (current and former) please make yourselves known! I'd love to highlight some go-to professionals/resources in an editorial project for [@GovLoop](https://govloop.com). [@stephaniethum](https://twitter.com/stephaniethum) could not have a list without you on it!

Here are a handful of detailed resources and government offices to follow:

Government offices leading CX

1. [GSA's Office of Customer Experience](#)
2. [The Agriculture Department's Office of Customer Experience](#)

Handbooks, toolkits, books

1. 18F's ["De-risking custom technology projects: A handbook for state budgeting and oversight"](#)
2. [GSA IT Modernization Centers of Excellence's "13 Plays of Our Customer Experience Approach"](#)
3. ["Dictionary of U.S. Federal Government Customer Experience Terms, Phrases, and Acronyms: A Guide for Practitioners and Consultants"](#)

Reports

1. ["Government for the People: Designing for Equitable and Trusted Customer Experiences"](#)
2. ["Maryland Statewide Customer Service Annual Report for Fiscal Year 2020"](#)

Government articles

1. ["Creating a User-Centered Approach in Government"](#)
2. [IT Modernization Centers of Excellence's "What Is a Customer Journey Map?"](#)
 - You can view additional examples of customer journey maps [here](#).



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